**Sample induction checklist**

New board members must have the opportunity to learn how to carry out their responsibilities and know what support they can expect. A thorough induction process is an essential introduction to your organisation. It should ensure that each new member acquires the necessary detail of how the organisation and the governing body works, so that they can play a full part in discussion and decision-making.

An induction plan might include:

* a welcome meeting and tour of the organisation to meet its staff, volunteers and beneficiaries.
* a meeting with a small group of trustees, including the Chair, to brief the new member on what is going on in the organisation, recent key decisions, challenges, and longer-term plans.

Here’s a sample induction checklist for what new members need to know. Ask existing members what they would have liked to know when they joined. Consider teaming up a new board member with an existing one for a year. By meeting up briefly before meetings to go through the agenda and sitting together at meetings, the learning curve for new members can be shortened.

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| **Key documents** | **Date provided** | **Received** |
| Governing document |  |  |
| Recent annual report and accounts |  |  |
| Overview of current financial position of the organisation |  |  |
| Recent Minutes of committee meetings |  |  |
| Dates of next committee meetings/other key dates |  |  |
| Details of any subcommittees |  |  |
| Copy of code of conduct |  |  |
| Copy of register of interests, to be completed and returned |  |  |
| Consent form and declaration, to be signed and returned |  |  |
| Copy of OSCR Guidance for Charity Trustees (if a charity) |  |  |
| Expenses policy and claim form |  |  |
| Outline of board members’ roles and responsibilities |  |  |
| List of main sources of funding (including fundraising contracts) |  |  |
| Risk register |  |  |
| Complaints Policy |  |  |
|  |  |  |
| **Organisational Information** |  |  |
| Mission statement |  |  |
| Brief history of the organisation |  |  |
| Organisation/staff structure |  |  |
| Contact details of board members and key personnel |  |  |
| Policies which apply to the board (e.g. equal opps/social media) |  |  |
| Job description of chief executive or key staff/volunteers |  |  |
| Business or strategic plan |  |  |
| Newsletters, publicity information |  |  |
| List of key stakeholders |  |  |